COMPUSEARCH

VPO PRISM

POST AWARD

User Workbook

Web Version 3.29

TRADEMARKS

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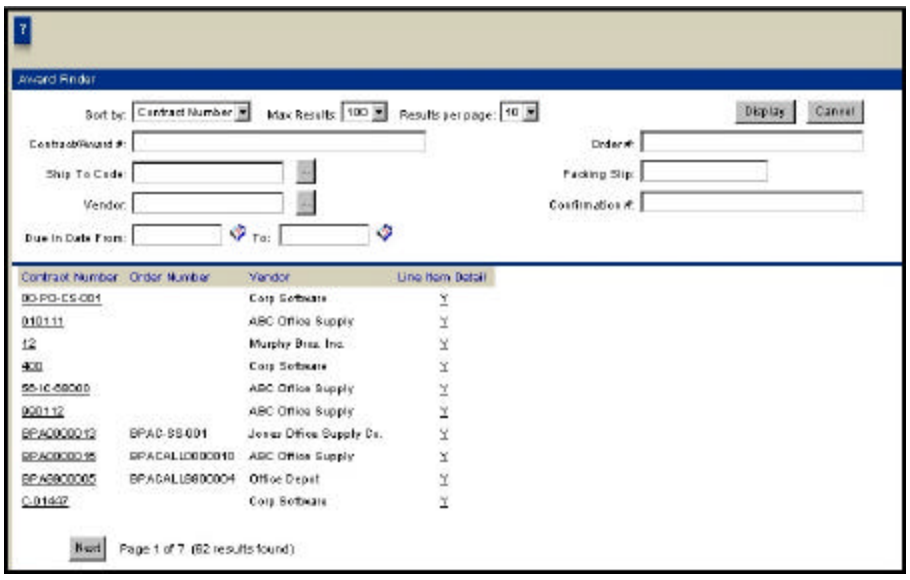
Receiving

After an award has been made, goods will be received and must be recorded. Receiving/Inspection reports may only be created for Quantity line items, not Dollar line items. To begin the receiving report process, click **Receiving** on the *Welcome* page menu.

Selecting an Award

The *Award Finder* search page will open. The following search criteria and options are available. Enter as many as possible to limit the results and make selection easier.



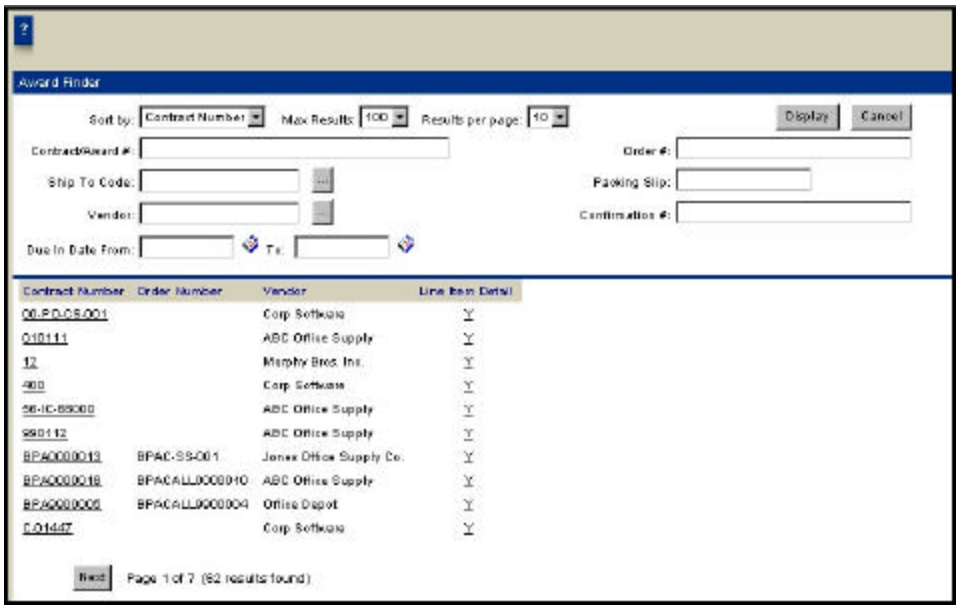
?? **Sort by** — You can select from Contract Number, Order Number, or Vendor on the drop-down list.

?? **Max Results** — This is an option as to how many results you want the system to find. The drop-down list offers 100, 200, 300, 400 and 500.

?? **Results per page** — This is an option as to how many results should be displayed at one time. The drop-down list offers 5, 10, 15, 20.

?? **Contract Award #** — You can enter the contract or award number here if you know it.

NOTES:



?? **Ship To Code** Enter the proper code or click the lookup button to select from available codes.

?? **Vendor** Enter the vendor code or click the lookup button to make a selection.

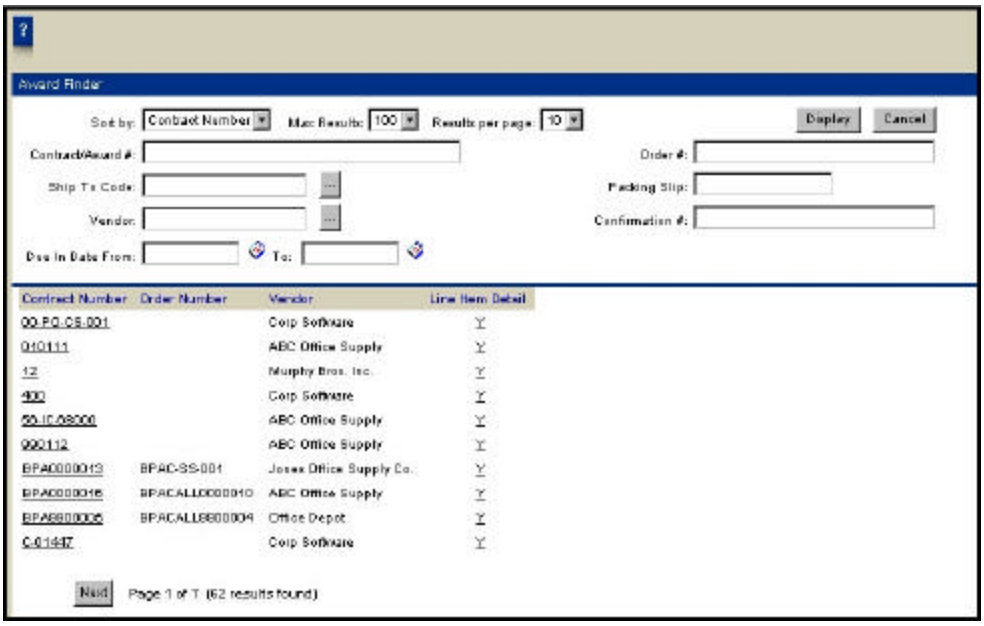
?? **Due Date From/To** Enter the dates or use the calendar icon.

?? **Order #** Enter the order number if you know it.

?? **Packing Slip** Enter the number of the packing slip received in the order.

?? **Confirmation #** Enter the confirmation number.

NOTES:



When you have entered all the information available to you and selected the options you want to use, click **Display**. Only open, released awards, which fit your criteria, will display. The following columns display:

?? *Contract Number* — The contract number is a hyperlink that you must click to make your selection. All other columns are informational to help you make your selection.

?? *Order Number* — The order number is automatically generated from the original document if applicable. The order number will only display for Delivery Orders, BPA Calls and Catalog Orders.

?? *Vendor* — The vendor is automatically generated from the original document.

?? *Line Item Detail* — Click **Y** to open a page listing the items included in this award. If there are several similar awards, you can review the items included on each one to make your selection easier. When you have finished reviewing the items, click **Return** on the menu to return to the *Award Selection* page.

NOTES:

After making your award selection, the *Receiving* main page will display.

The *Receiving* main page contains four sections, a Menu, a blue toolbar, the *General Information* section, and the *Receiving* section.

The *General Information* section is automatically generated from the selected award. It includes Award Number, Buyer, Vendor Name and Contracting Officer. This section remains the same as you move through the menu.

NOTES:

The *Receiving* section displays all the receiving reports for this award. The columns include:

?? *Select* Click to select a Receiving Report for further action by using a button on the blue toolbar.

?? *Received Date* The date the items were received. This item is also a hyperlink that can be used to select the item for editing.

?? *Received By* The individual who received the items.

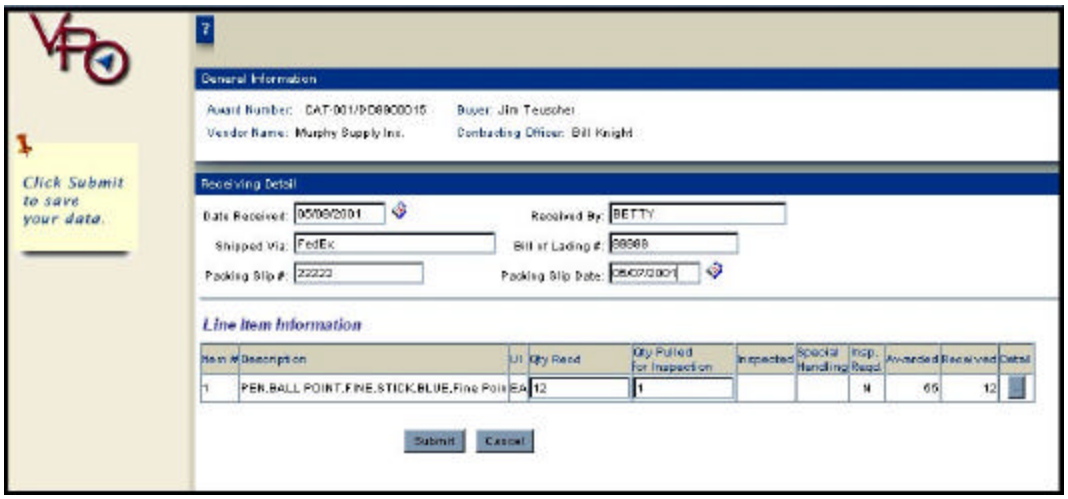
?? *Shipped Via* The company used to ship the items.

?? *Packing Slip #* The number of the packing slip received from the vendor.

?? *Packing Slip Date* The date of the packing slip.

NOTES:

Adding Receiving Report



Click **Add** on the toolbar to add Receiving information. The *Receiving Detail* page will open and display the following fields. Some information may be automatically generated. Other information will need to be added.

?? **Date Received** — The date the items were delivered to the ship to location. Defaults to the current date but may be edited. Enter or use the calendar icon.

?? **Received By** — Name of the person who received the items. Defaults to the current user but may be edited.

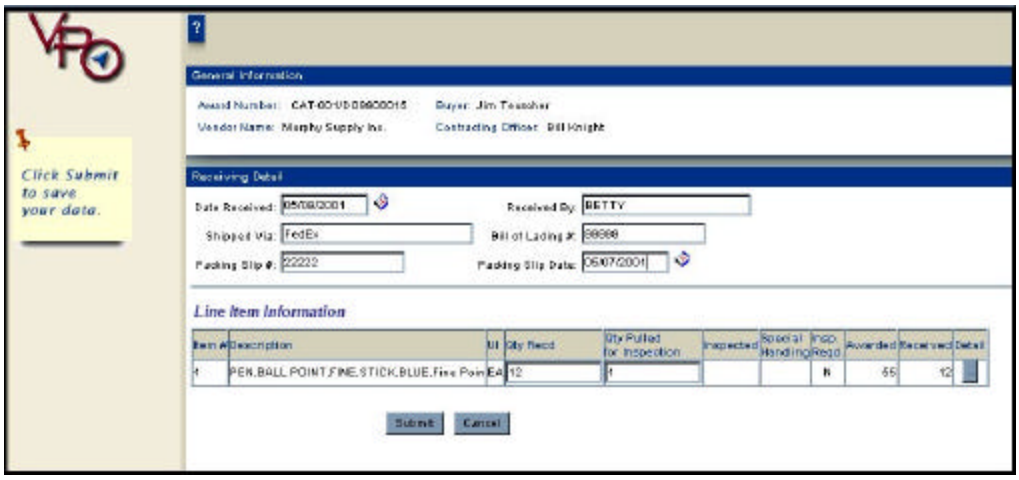
?? **Shipped Via** — Enter the name of the company used to ship the items (UPS, FedEx etc.)

?? **Bill of Lading #** — Enter the number of the Bill of Lading slip. This document # ensures the agency received the shipment.

?? **Packing Slip #** — Enter the number of the Packing Slip. The Packing Slip displays information such as number of items in the shipment and quantity.

?? **Packing Slip Date** — Enter the date of the packing slip. You can use the calendar icon.

NOTES:



The *Line Item Information* section includes automatically generated information for all line item on this award. This is where receiving and inspection information may be added. The columns include:

?? **Item #** — The number of the line item. This column is automatically generated from the award. This information cannot be edited here.

?? **Description** — The description text of the line item that was entered on the award. This column is automatically generated and cannot be edited here.

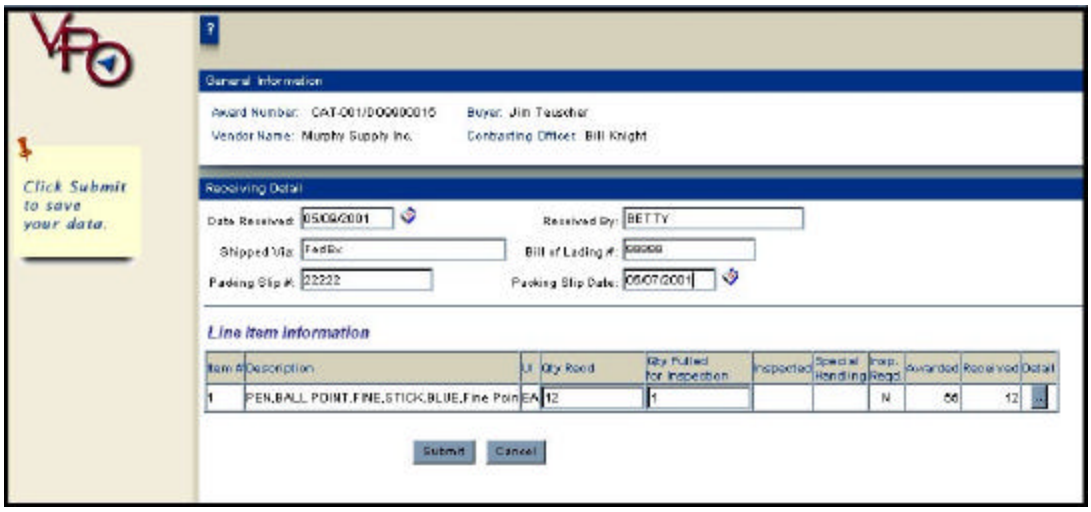
?? **UI** — Displays the unit of issue, automatically generated from the award. This information cannot be edited here.

?? **Qty Recd** — You can enter the quantity just received in this column or click **Detail** to go to another *Receiving Detail* page.

?? **Qty Pulled for Inspection** — You can enter the quantity pulled for inspection in this column or click **Detail** to go to another *Receiving Detail* page.

?? **Inspected** — Displays the number of units inspected to date.

NOTES:



?? **Special Handling** Displays any special handling instructions entered on the award.

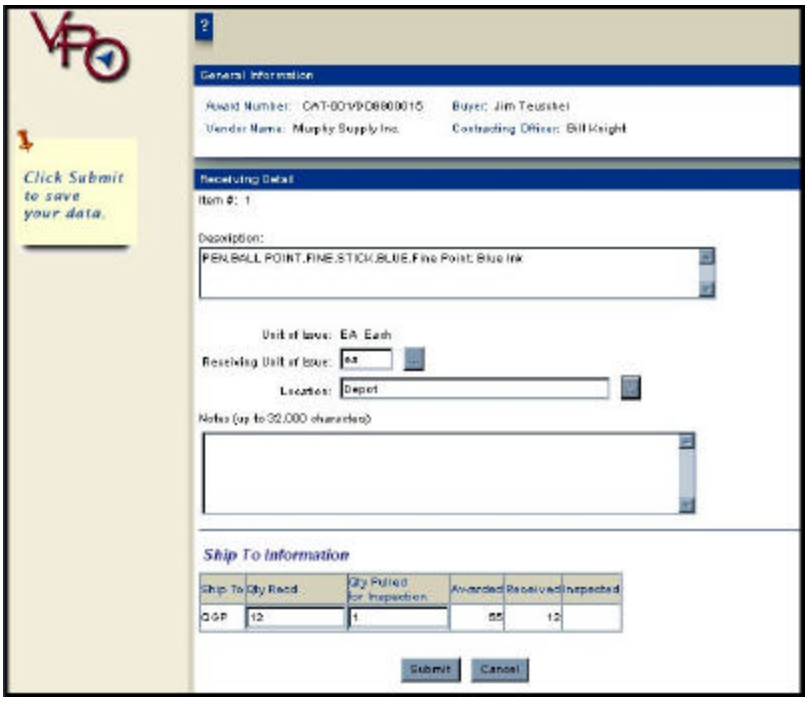
?? **Insp. Reqd.** Indicates if inspection was required. This information is automatically generated from the award and cannot be edited here.

?? **Awarded** Displays the quantity of this item included in the award. This information is automatically generated from the award and cannot be edited here.

?? **Received** Displays the quantity of this item recorded as received to date. This information is automatically generated and cannot be edited here.

?? **Detail** Click **Detail** to open a *Receiving Detail* page where additional information can be entered. If the award is to be shipped to several locations, or if notes need to be added to the report, the **Detail** selection must be made.

NOTES:



Click **Detail** to open the *Receiving Detail* page for the selected item. The following fields will display:

?? **Item #** — The number of the line item selected.

?? **Description** — The description of the item as entered on the award. This item cannot be edited here.

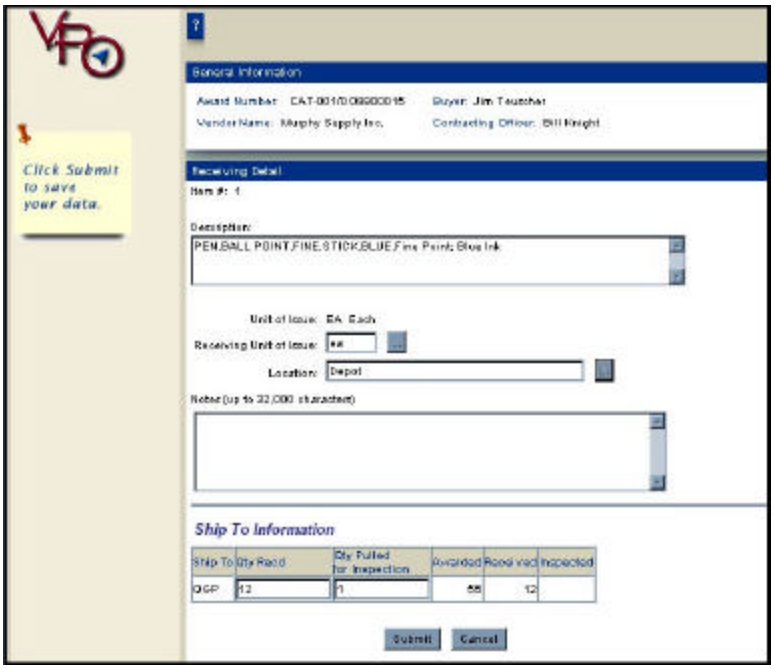
?? **Unit of Issue** — Automatically generated and cannot be edited.

?? **Receiving Unit of Issue** — Enter the unit of issued received if different from the award. The lookup button can be used.

?? **Location** — Enter the location where the items were received or use the lookup button.

?? **Notes** — A general text box for notes about the receiving report. These notes will display on the *History* page.

NOTES:



In the *Ship To Information* section, each Ship To location is listed and contains the following fields:

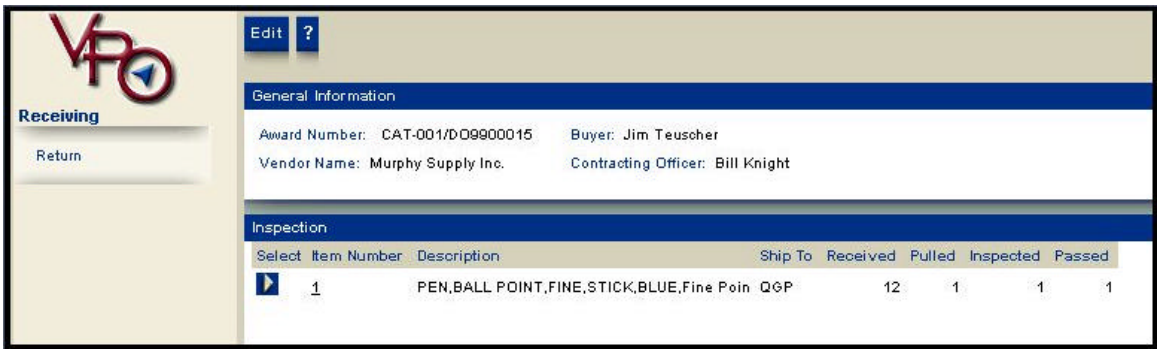
- **Ship To** — The location code for this part of the shipment.
- **Qty Recd** — Enter the quantity in this shipment received at each location.
- **Qty Pulled for Inspection** — Enter the quantity of this shipment pulled for inspection at this location.
- **Awarded** — The total quantity awarded to be shipped to this location.
- **Received** — The total quantity received to date at this location.
- **Inspected** — The total quantity inspected to date at this location.

When all information has been added, click **Submit** to return to the *Receiving Detail* main page. When the Detail section is used, the quantities received and inspected will be brought forward to the *Receiving Detail* main page.

When all items have been entered for this receiving report, click **Submit** to record your data.

NOTES:

Adding Inspection Information



To add or edit inspection information, on the *Receiving* main page select a receiving report and click **Inspection**. The *Inspection* page will open. Each item included in the receiving report will display. The columns are:

?? *Select* Click to select an item number.

?? *Item Number* The item number brought forward from the award.

?? *Description* Description of the item from the award.

?? *Ship To* Location where the goods were shipped.

?? *Received* The total quantity received to date.

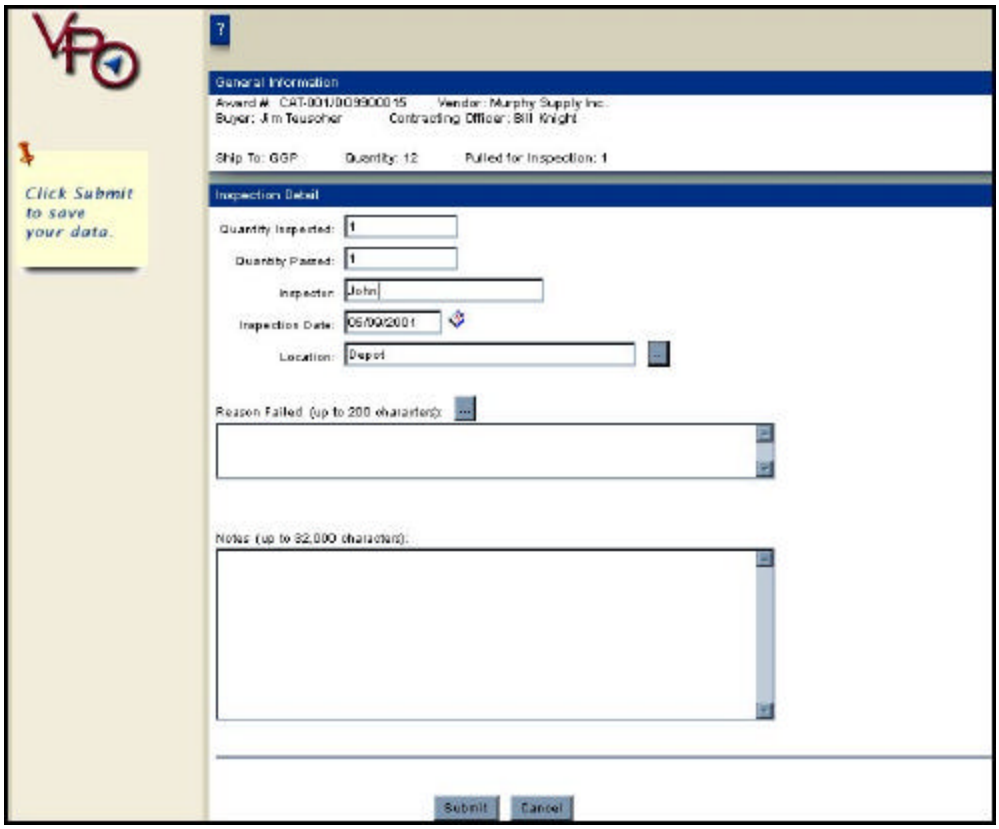
?? *Pulled* The total quantity pulled for inspection to date.

?? *Inspected* The total quantity inspected to date.

?? *Passed* The total quantity of inspected items that passed.

To add inspection information, select a line item and click **Edit**. The *Inspection Detail* page will display.

NOTES:



The *General Information* section has now changed. In addition to the information previously displayed, the Ship To code, Quantity and Pulled for Inspection are included. These three items are automatically generated and cannot be edited here.

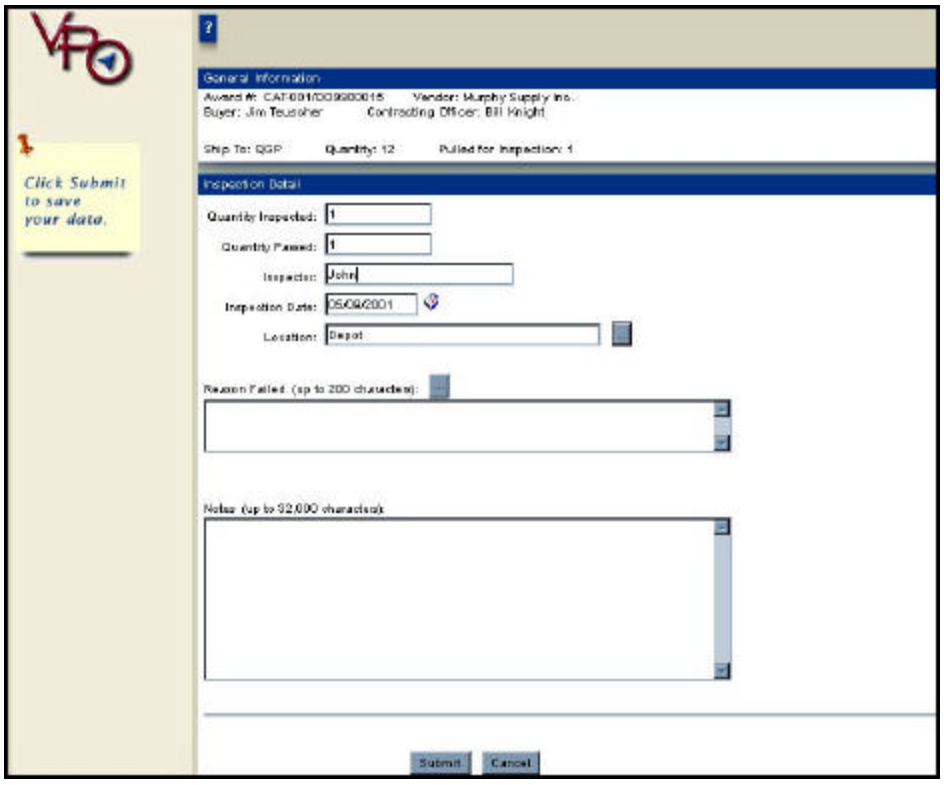
The following fields display:

?? **Quantity Inspected** Enter the quantity inspected for this report.

?? **Quantity Passed** Enter the quantity passed for this report.

?? **Inspector** Enter the name of the person conducting the inspection.

NOTES:



?? **Inspection Date** This field defaults to today's date. If necessary, edit the information or use the calendar icon.

?? **Location** Enter the location where the inspection took place.

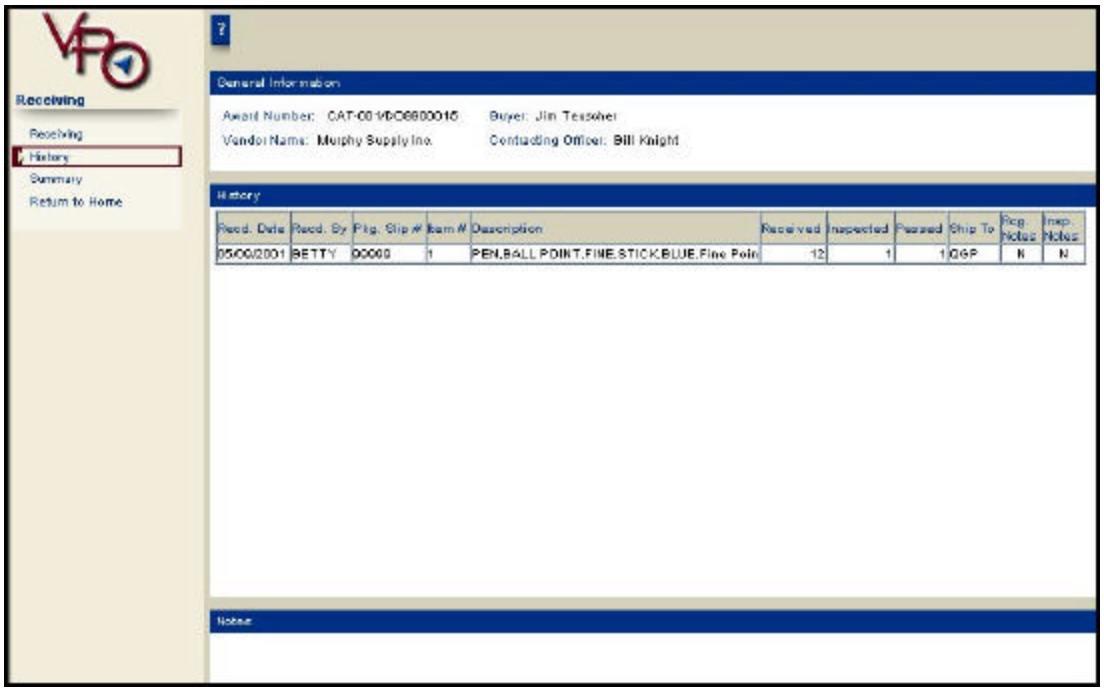
?? **Reason Failed** Enter the reason items failed. Click the lookup button to select from pre-established reasons.

?? **Notes** Enter any notes about this inspection or shipment. The notes entered here will display on the *History* page.

When all items have been entered click **Submit** to record your data and return to the *Inspection* main page. Select **Return** on the menu to return to the *Receiving* main page.

NOTES:

History



History displays the receiving history for this award. Each receiving report for this award is listed separately. Any notes entered can be displayed by clicking the **Y** under the Insp. Notes column.

NOTES:

Summary

Displays a summary of receiving information for this award. This page is limited to the total for each item shipped to one location, and lists the total quantity awarded, received, inspected, and passed.

Other Menu Options

?? **Return to Home** Click to return to the *Welcome* page.

NOTES:

Reference – Toolbars by Menu Options

Receiving displays all receiving reports for this award. Depending on the document status and your access rights the blue toolbar may include:

?? **Add** Click to add a new receiving report.

?? **Edit** Select an existing receiving report and click to edit. The page that opens will be the same as when adding a new receiving report. Refer to Adding a New Receiving Report.

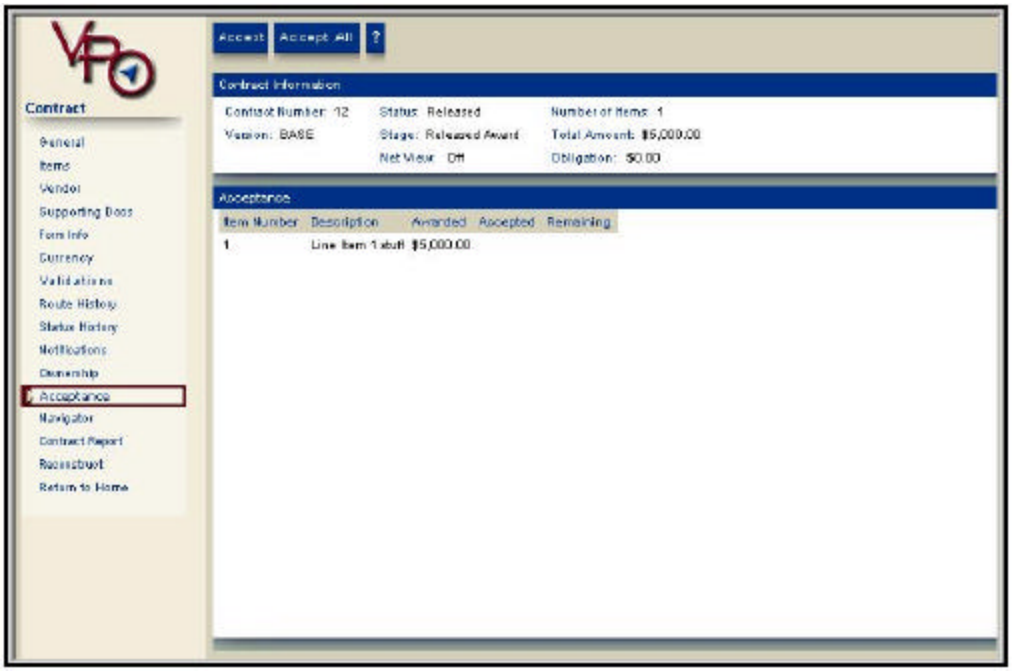
?? **Delete** Click to delete a selected receiving report. PRISM will prompt you for a confirmation before completing the action.

?? **View** Click to review a selected receiving report. A summary of information entered is displayed on the *Additional Information* page. It cannot be edited here. Click **Return** on the menu to return to the *Receiving* main page.

?? **Inspection** Click to add or edit inspection information for a selected receiving report.

NOTES:

Acceptance



After a contract has been released, line items will be received and accepted by the agency. Open the award and click **Acceptance** to display a list of all line items included in this contract. The following headings display:

?? *Item Number* The assigned number of this line item.

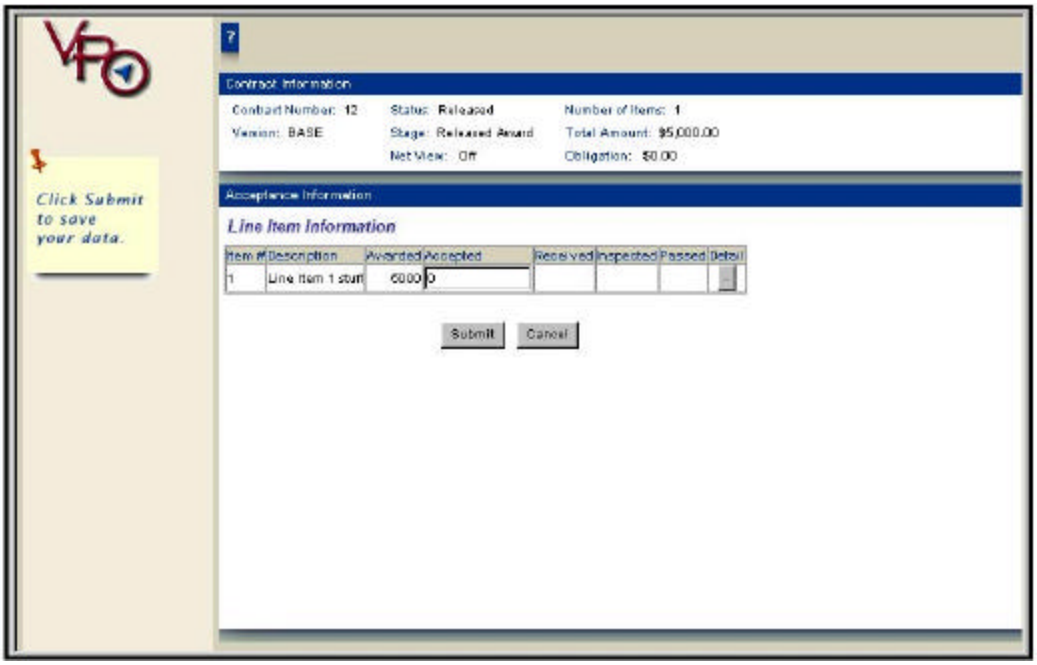
?? *Description* A brief description of this line item.

?? *Awarded* The total quantity of this line item awarded on this contract.

?? *Accepted* The total quantity of this line item that has been accepted.

?? *Remaining* The remaining quantity of this line item that has not been accepted.

NOTES:



If only part of the listed line items are to be accepted, click **Accept** on the toolbar to open the *Acceptance Information* page. Each line item will again display, but with the following differences:

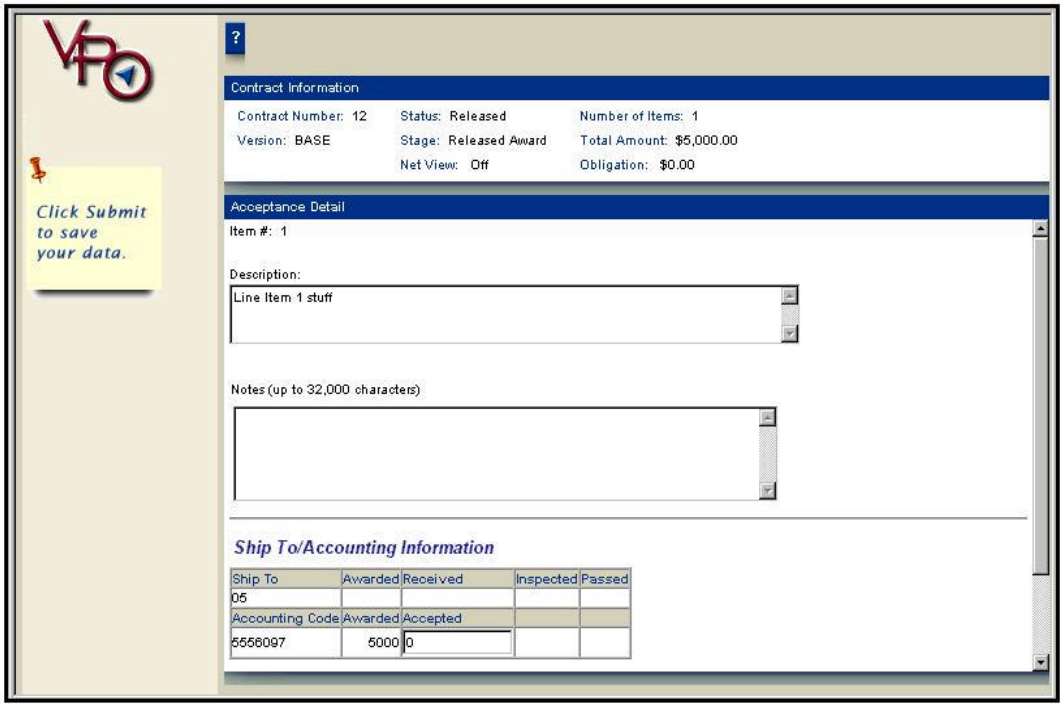
?? **Accepted** This field will now be available for edit. Enter the quantity of the line item to be accepted.

?? **Received** This field will display the quantity of the line item that has been received to date. This field cannot be edited here.

?? **Inspected** This field will display the quantity of the line item that has been inspected. This field cannot be edited here.

?? **Passed** This field will display the quantity of the line item that passed inspection. This field cannot be edited here

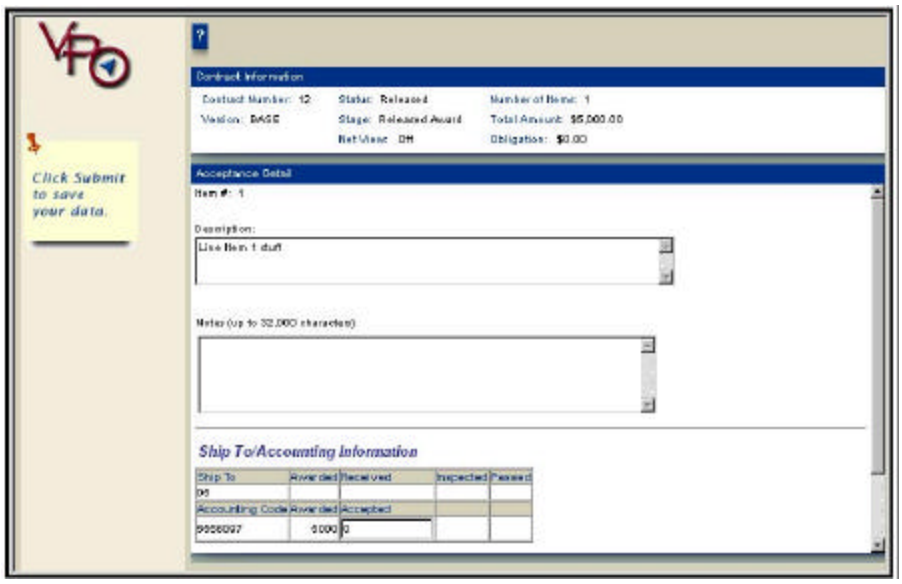
NOTES:



?? **Detail** — Select to assign the accepted line item to specific Accounting Codes. The *Acceptance Detail* page will open. The following fields will display:

- ?? **Item #** — This corresponds to the selected item number. It cannot be edited here.
- ?? **Description** — A brief description of the item. It cannot be edited here.
- ?? **Notes** — Notes may be added or edited in this field.

NOTES:



The *Ship To/Accounting Information* section displays the following fields:

?? **Ship To** — The Ship To code previously assigned to the line item.

?? **Awarded/ Received/ Inspected/ Passed** — See the definitions above for these fields. They may not be edited here.

?? **Accounting Code** — The Accounting Codes assigned to this line item.

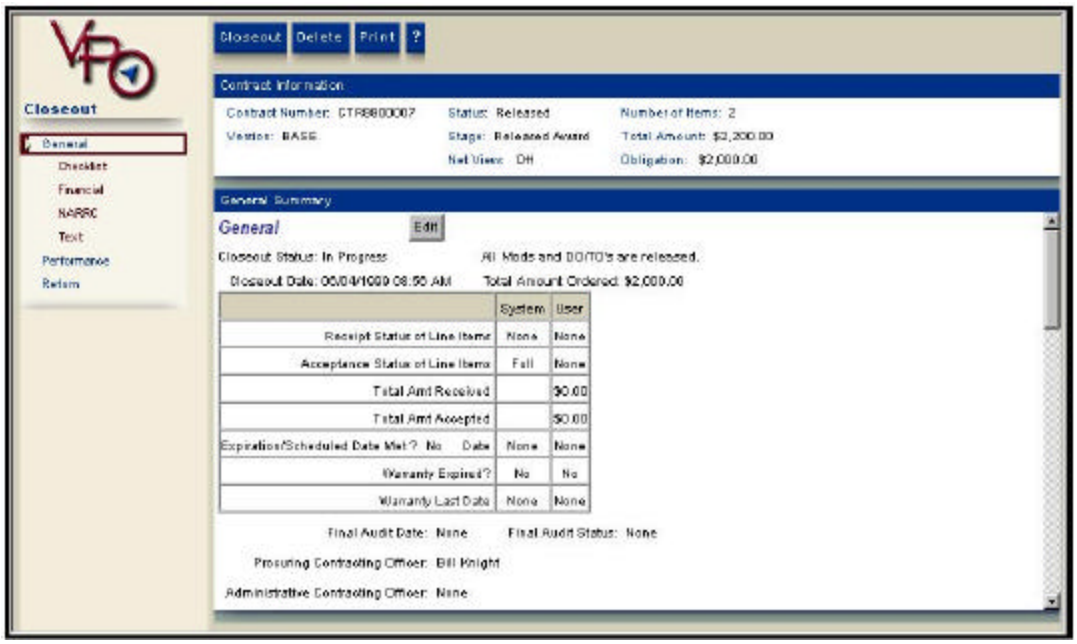
?? **Awarded** — The quantity awarded under this Accounting Code.

?? **Accepted** — Enter the quantity to be accepted under this Accounting Code.

When all information has been completed, click **Submit** to return to the *Acceptance Information* page. When this page is complete, click **Submit** to record your data.

NOTES:

Closing Out a Contract



After all items in an award have been delivered, and all parts of the Contract have been completed, the contract may be closed out. After closeout the award may not be edited or modified. The award will remain in the database until archived and may be reopened at any time.

Open a released document and click **Closeout**. The *Closeout* page will display. This page is divided into four sections, the *Contract Information* section discussed earlier, a Menu, a new toolbar, and a *General Summary* section. The Menu includes the following:

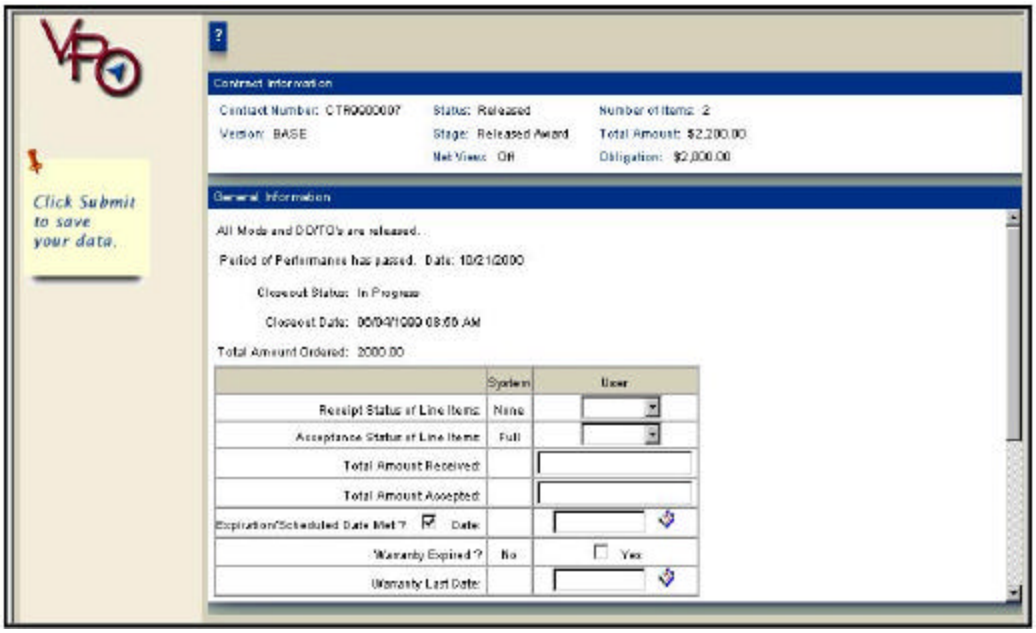
?? **General** — This is the default option when opening **Closeout**. The *General Summary* page displays. The four options listed under **General** are the sections included in the *General Summary* page. Clicking one of these options takes you directly to that section. The sections may be edited by clicking **Edit** to the right of the section title.

?? **Performance** — Click to add vendor performance information. Refer to Vendor Performance.

?? **Return** — Click to leave **Closeout** without completing the Closeout.

NOTES:

General

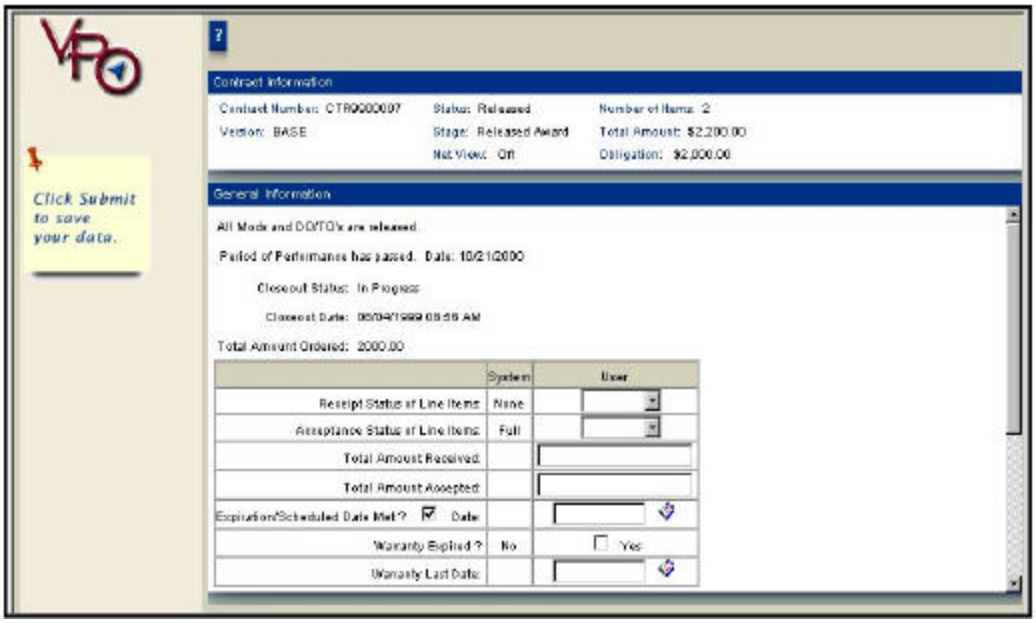


The *General Summary* section of the *Closeout* page includes four sections, *Checklist*, *Financial*, *NARRC* and *Text*. Each may be edited by clicking **Edit** beside the section title. The fields included are:

The information included in the first five lines is system-generated and cannot be edited. The following fields are system generated, but may be edited:

- **Receipt/Acceptance Status of Line Items** — If this information is incorrect, use the drop-down list to select **Full**, **Partial**, or **Canceled**.
- **Total Amount Received/Accepted** — If this information is incorrect, fill in the proper amounts in the respective fields.
- **Expiration/Schedule Date Met?/Date** — If the date was met, select this checkbox. Enter the date if necessary.
- **Warranty Expired/Warranty Last Date** — The **Warranty Expired?** checkbox must be selected to enter a **Warranty Last Date**.

NOTES:



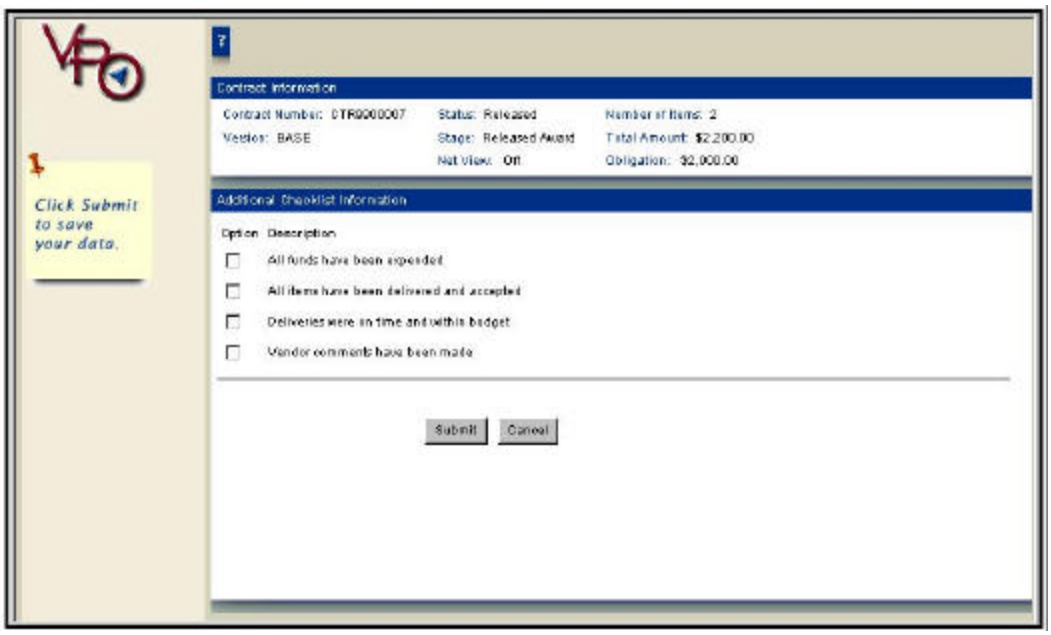
?? **Final Audit Date/Status** — Enter the final audit date and status.

?? **Procuring Contract Officer** — System-generated and cannot be edited.

?? **Administrative Contracting Officer** — This field may be edited.

When all information has been completed, click **Submit** to return to the *Closeout* main page.

NOTES:

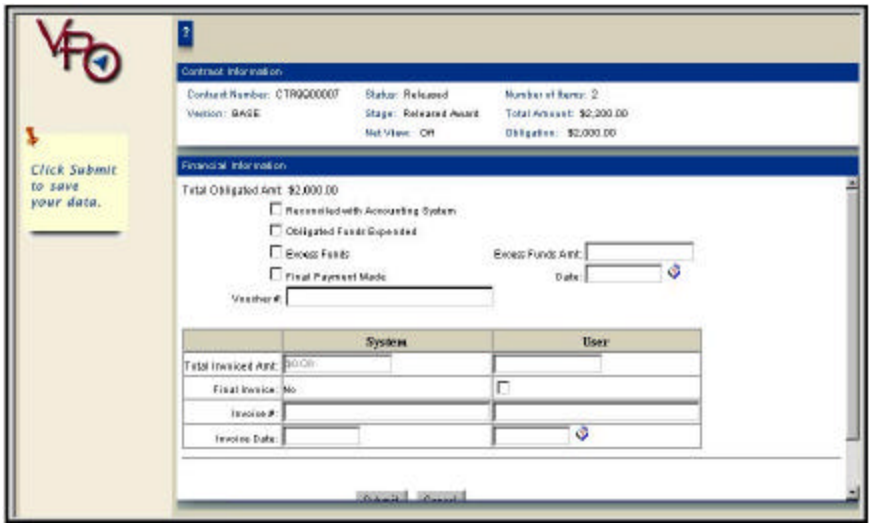


Checklist

Checklist displays a list of agency specific items created by the System Administrator under System Setup. The intent is for the agency to identify everything that needs to be accomplished to close out the contract. Ideally all items would be checked off before the closeout procedure is completed. Check the Option box as each item is completed.

When all options have been checked, click **Submit** to return to the *Closeout* main page.

NOTES:



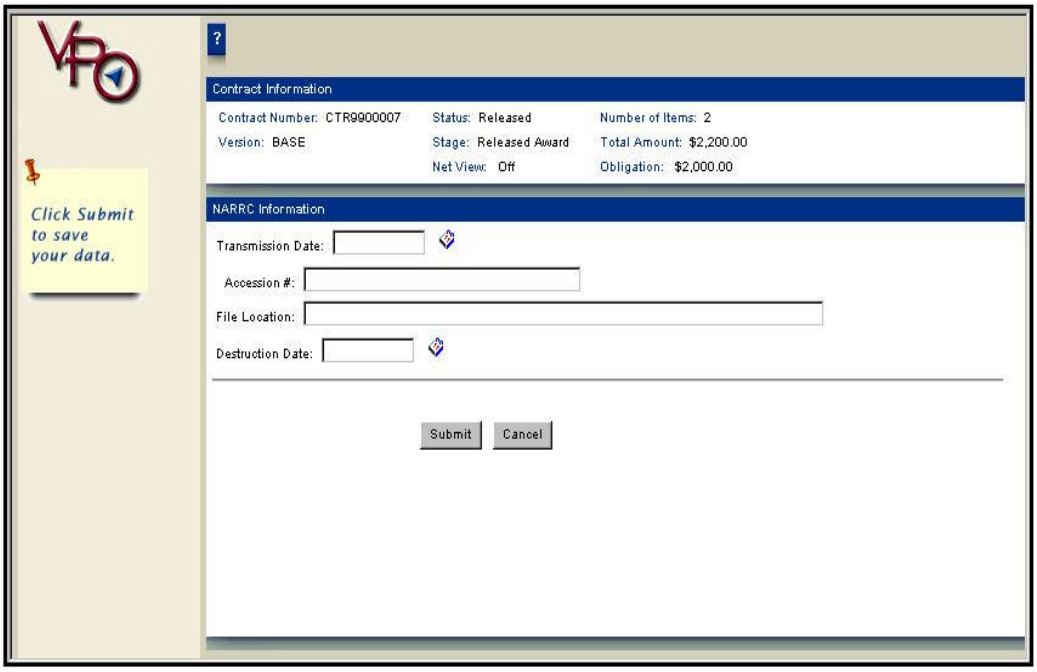
Financial

Financial displays system-generated financial information. The first item, *Total Obligated Amt* cannot be edited.

- **Reconciled with Accounting System/Obligated Funds Expended** — Select the correct checkbox. More than one checkbox may be checked.
- **Excess Funds/Excess Funds Amt** — If this checkbox is selected, the Amount field will activate and must be completed.
- **Final Payment Made/Voucher #/Date** — If this checkbox is selected, the Voucher # and Date fields will activate and must be completed.
- **Total Invoiced Amt** — If the system-generated information is incorrect, enter the correct information in this field.
- **Final Invoice** — Select this checkbox if a Final Invoice has been sent.
- **Invoice #/ Invoice Date** — If the Final Invoice checkbox is selected these fields will activate.

When all information has been completed, click **Submit** to return to the *Closeout* main page.

NOTES:



NARRC

This section is used if the document is being sent to the National Archives.

?? **Transmission Date** Enter or use the calendar button to enter the date the document was sent to the National Archives.

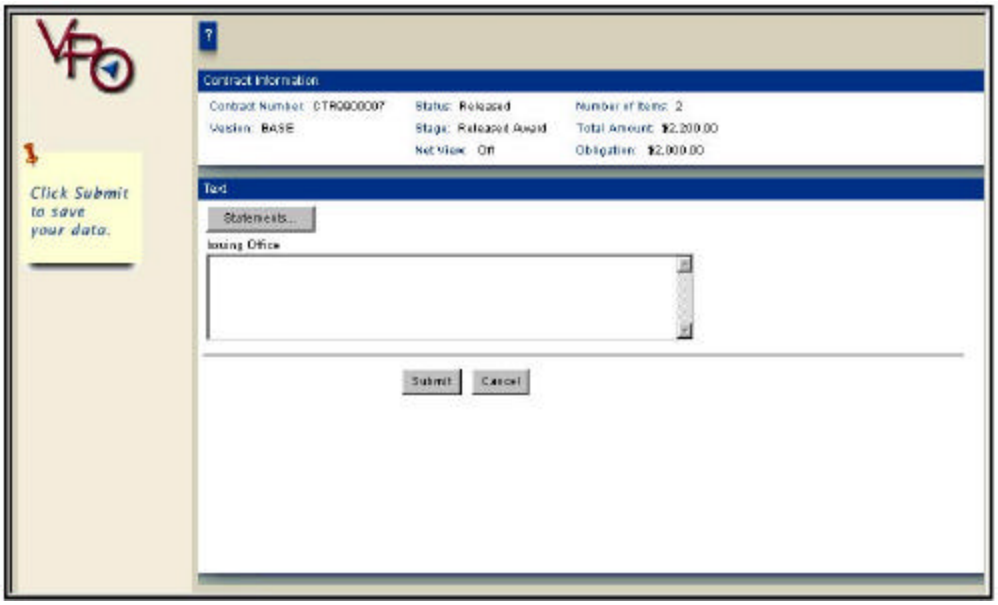
?? **Accession #** Enter the number assigned to the award by the National Archives.

?? **File Location** Enter the location where the archived award is located in the National Archives.

?? **Destruction Date** Enter the date when the file can be destroyed (typically, this date is several years from the current date.

Click **Submit** to record this data and return to the *Closeout* page.

NOTES:



Text

Select the **Edit** button of the information to be edited. The *Text* page will open containing a **Statements…** button.

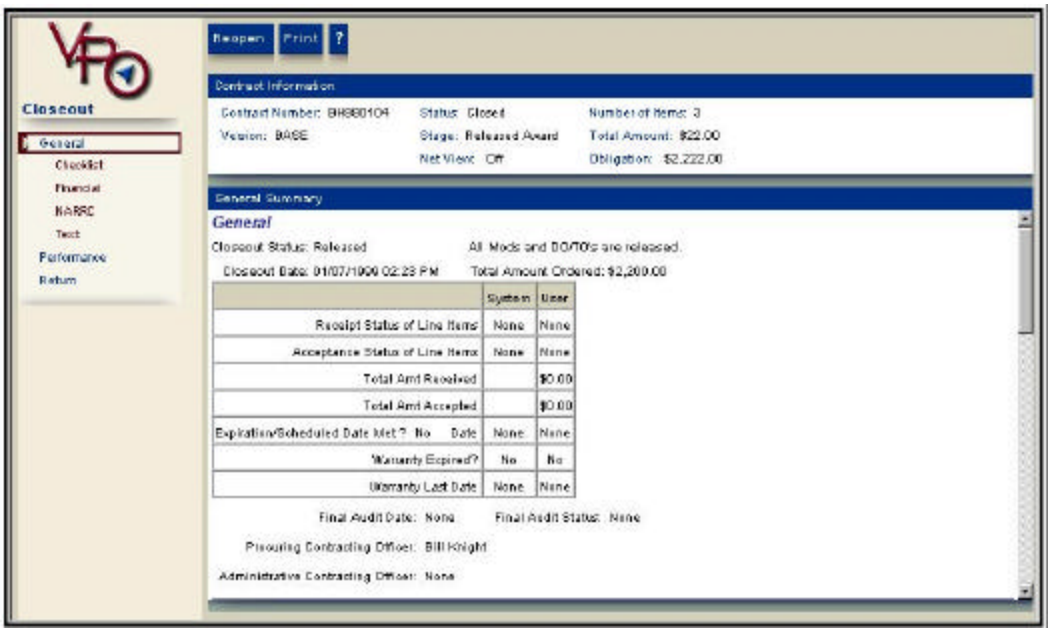
?? **Issuing Office** Enter the text manually or select from the **Statements** picklist.

?? **Admin Office** Enter the text manually or select from the **Statements** picklist.

When each section is completed, click **Submit** to save your data and return to the *General Summary* page.

NOTE: Depending upon your agency's setup, additional fields may be displayed. Contact your System Administrator for information concerning these fields.

NOTES:



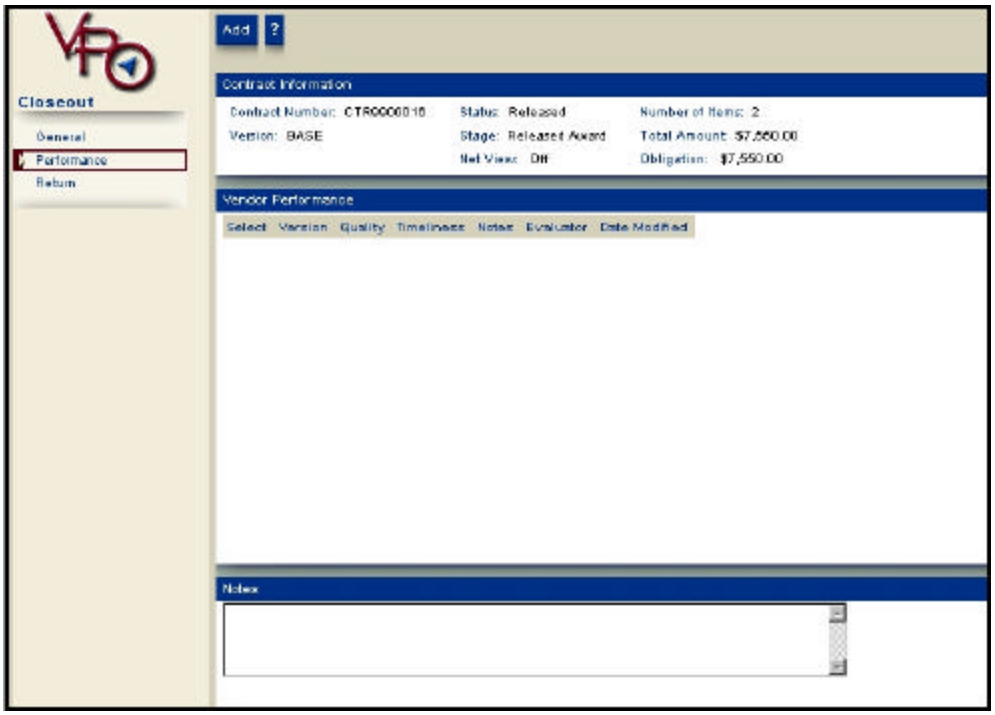
When all information has been corrected, click **Closeout** on the blue toolbar to continue the closeout procedure, or **Delete** to delete the information from the present closeout. Either option will be confirmed.

After Closeout, the award may be reopened by clicking **Closeout** on the *General Summary* page, then **Reopen,** which will now display on the *Closeout General Summary* page.

NOTE: All associated closed requisitions are not automatically reopened.

NOTES:

Performance



Click **Performance** to add vendor performance information.

The *Vendor Performance* page will display any existing entries. You can **Add** a new entry, **Edit** an existing entry, or **Delete** an existing entry by selecting the entry and clicking the desired toolbar option.

Select the **Version**, **Quality** and **Timeliness** from the drop-down lists. Enter any descriptive notes in the **Notes** field. When complete, click **Submit**.

NOTES: